GEARS
General Enterprise And Resource Support

The GEARS project team in partnership with the Department of Budget and Finance, District Court Headquarters and the Department of Procurement, Contract and Grant Administration will be offering training to assist users in understanding processes to successfully perform their jobs. We are offering sessions specific to select audiences, so please be sure to register for the correct session. The time for each session is noted on the registration form.

To attend training, a person should be an active "user" of the GEARS system and already have a User ID.

Commitment Control (KK): How to do KK Inquiry and Reporting– Non-*District Court* – Reports and inquiries to be reviewed include the Budget Status, Budget Overview, Requisition and PO Budgetary Activity Report (and the PO Buydown and PO Close Report as time allows).

General Ledger (GL): How to enter a journal entry – *Non-District Court* – This session will cover the step by step process for entering GL journal entries.

General Ledger (GL): How to do GL Inquiry and Reporting – Non-*District Court* – Reports and inquiries to be reviewed include the Trial Balance, Detail Trial Balance, Ledger Inquiry with drilldowns, and the Voucher Activity Inquiry (as time allows).

Order to Cash – *All* – These sessions are exclusive to OTC staff only and cover the OTC process from beginning to end. If you are a new Judiciary staff person responsible for these tasks and you have not taken the 2-day OTC comprehensive class in the past, you should sign up for all of the OTC classes in the sequence noted (1-6) for the court you work in. If you are an OTC user and have taken the 2-day comprehensive OTC class in the past, you may sign up for any of the classes pertinent to your court as a refresher. *****Please have your OTC manual accessible. *****

1. End of Day / Deposit Processing
2. FAR and Post-FAR Adjustments
3. AP Revenue Refunds
4. Bad Check Processing
5. How to do EOM / Local Processing
6. Clearing Account Reconciliation

Procure to Pay – *District Court* – This session will cover the areas of Procure to Pay, i.e. requisitions, express PO's, receipts and voucher processing, specific to District Court processing. In addition, a review of available reports to view and research vouchers will be performed.

Procure to Pay (PTP): How to Enter an ePro requisition – *Non-District Court* – This session will cover the step by step process for entering an ePro requisition, modifying a requisition or cancelling one. In addition, the topic of correcting a requisition that has been purchased back by Procurement will be discussed. **(Please note, there is a separate PTP session for DC staff.)**

Procure to Pay (PTP): How to Enter an Express PO – *Non-District Court* – This session will cover the step by step process for entering an express PO, creating a change order or cancelling an express PO. In addition, the process to add a contract to the express PO will be reviewed. **(Please note, there is a separate PTP session for DC staff.)**

Procure to Pay (PTP): How to Enter a Receipt – *Non-District Court* – This session will cover the step by step process for entering a receipt and how to go back and attach a receipt to a voucher. **(Please note, there is a separate PTP session for DC staff.)**

Procure to Pay (PTP): How to Enter a Voucher – *Non-District Court* – This session will cover the step by step process for entering multiple types of vouchers, expense (non-PO), PO voucher, and a PO receipt voucher. **(Please note, there is a separate PTP session for DC staff.)**

Procure to Pay (PTP): How to do AP Inquiry and Reporting – Non-*District Court* – This session will cover the topics of looking up vendor information, how to find existing vouchers, how to use the voucher activity inquiry page and reviewing vendor payment history. **(Please note, there is a separate PTP session for DC staff.)**

Procure to Pay (PTP): How to do Purchasing Inquiry and Reporting & PO Closure – Non-*District Court* – This session will cover the topics of understanding the PO Inquiry page (Document Status and Activity), running a PO Buydown Report, the PO Close Request page and using the Procurement Inquiry page. In addition, the process to find the Associated PO Number and Receipt Number for a voucher will be reviewed. **(Please note, there is a separate PTP session for DC staff.)**

Procure to Pay (PTP): How to Manage a P-card– *All* – This session will cover the workflow and process requirements for those users which hold a Judiciary P-card and/or are responsible for reconciling the P-card statement monthly.

Travel Policy Review and Form Completion – *ALL* – This session will review the current Judiciary travel policy, as well as the proper completion of the expense reimbursement form. In addition, common reoccurring issues/errors will be discussed.

***All training will be held using Microsoft Teams. Prior to the day of training, all participants will receive a calendar invite with the required information. Please be sure to mark your calendars upon registering. ***

Please keep in mind that we can accommodate 12 people in each class and the registrations will be processed in the order they are received.   You will receive an email confirmation in return.